Case Summary Screen

CREATION DATE: April 12, 2006

Pointers to Remember:
The purpose of the client summary screen is to provide crucial information for social workers and supervisors about each client in a case. The information shown on the Case Summary screen is entered on other screens throughout the case.

1. The client **Information** section contains a summary of data entered on the CPS Hotline screen. This includes **Case Name**, **Family Case Type**, **Case Number**, and **Family Worker** name.
2. The **Reason for Agency Involvement** section contains information entered during the initial intake process. This screen is pulling information directly from the CPS Hotline screen. It contains the reason why this case was opened or brought to the Agency's attention. This screen will include the **Referral ID**, **Referral Date**, and narrative information containing the reason for the initial complaint.
3. The **Case History** section document the date case was opened and/or closed with CFSA. The **Open Date** field will populate the intake date. If this were a closed case, the **Close Date** field will populate the date the case was closed by CFSA. The reason to which the case was closed will populate in the **Reason** field.

Client Information section.

Reason for Agency Involvement Section.

Case History section.

Figure 1

4. The **Recommend Case Closure** section should be completed if the worker is choosing to close the case.

Steps include:

Step 1: Check the **Recommend Case Closure** box. Once this box is checked, other field will become mandatory.
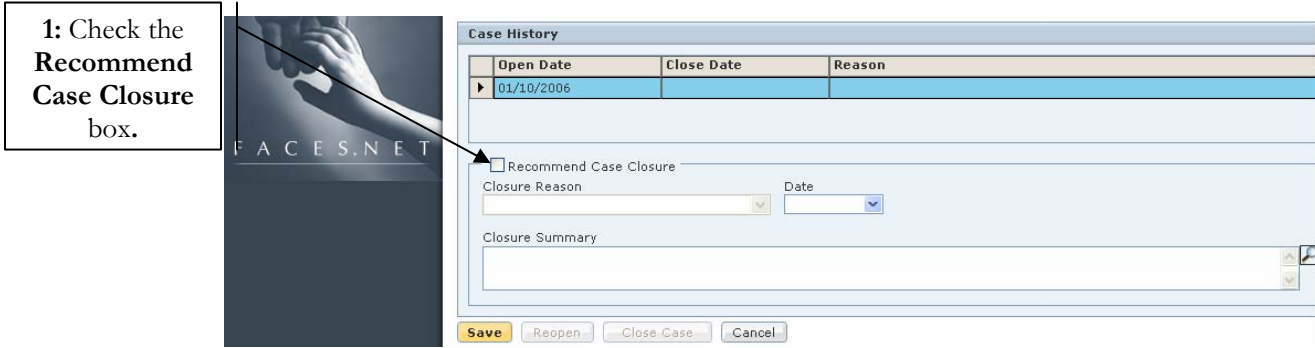

1: Check the **Recommend Case Closure** box**.**

Figure 2

Step 2: Select the reason for case closure from the **Closure Reason** pick list.

Step 3: Enter the date case closure in being recommended in the **Date** field.

Step 4: Enter narrative information regarding the reason for requesting case closure in the **Closure Summary** text box.
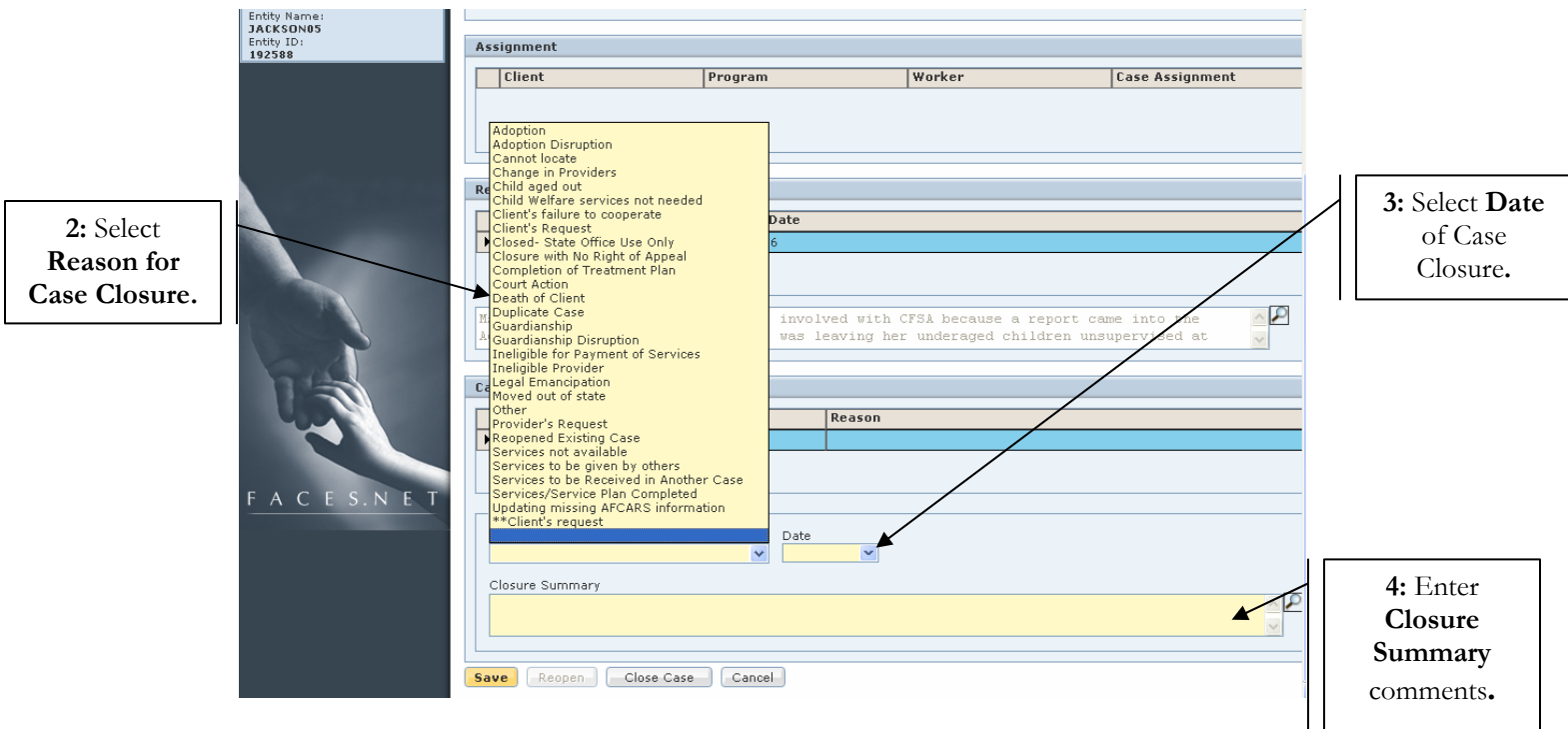

2: Select **Reason for Case Closure.**

3: Select **Date** of Case Closure**.**

4: Enter **Closure Summary** comments**.**

Figure 3

Best Practice Reports Reference Guide

Data input for the above tip sheet will affect statistics recorded for **Best Practice # XI.3 – CMT068MM—Caseload Count By Program Administrator and Manager**

CMT068MM captures the following information:

- Unassigned cases are cases in transfer process.
- Refer to the report CMT069MS for details of unassigned cases.
- Family Cases are: A) All open cases where all the children are in the home and at least one child is under the age of 21. B) All open cases where at least one child is at home and at least one child is in placement. C) All open cases where no children are in the home, but the goal for at least one child is reunification. This is a count of cases.
- Placement Cases include all children in open cases where a child has been removed from the home and is in the custody of CFSA and a payment is being generated (i.e., residential treatment, hospitals, foster homes, group homes, etc.) This is a count of children.
- OTI Cases include all children in open case-type of OTI. This is a count of children.
- Third Party Cases are: A) Children in Non-CFSA Custody with a Legal Status of Private 3rd Party. B) Children in a non-paid 3rd party placement of Non-Foster Care Non-Paid and Kinship Unlicensed Non-Paid. This is a count of children.